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About Dbriefs

Anticipating tomorrow's complex issues and new strategies is a challenge. Forecast your future with Dbriefs—live webcasts that give you valuable insights on important developments affecting your business.

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Transactions & Business Events

Host: Don Fancher

The cyber talent gap: New considerations and strategies

August 23, 2:00 p.m. ET

Presenters: Sharon Chand and Elaine Loo

Demand for cyber talent continues to outpace companies' efforts to build skilled and capable workforces. What innovative strategies can academia, government, and industry use to speed skill development and overcome the cyber talent gap? We'll discuss:

- Cyber workforce challenges, including retention and turnover, a rapidly changing threat environment, and growing visibility of cyber incidents.
- Impacts of the cyber talent gap on selected industries, including health care, life sciences, manufacturing, and power and utilities.
- Potential paths forward, including managed identity and access management services, innovative training, learning and cyber culture strategies, managed threat services, and cyber wargaming.

Learn new ways to engage and prepare your workforce for cyber threats and vulnerabilities.

Managed exits: Redefining your production footprint today for the economic and political landscapes of tomorrow

September 28, 2:00 p.m. ET

Presenters: Anthony Jackson, Neil Heyside, and Pete Talkington

Advantages of offshore production continue to erode in the face of a changing political and regulatory environment. What are principal factors to consider as companies redefine their production footprints? We'll discuss:

- Assessing your company's current footprint to establish potential paths forward, including assessing tax implications and current and future political impacts of proposed site changes.
- Considerations for communicating the selected approach, executing the plan, and driving the plan vision forward.
- Conducting a managed exit of vacated sites, including effective migration from old to new sites with minimum impact to business continuity.

Learn how companies are responding to changing economic and political conditions as they refine their production footprints globally.

Controllershship Perspectives

Host: Beth Kaplan

Fostering talent with the changing role of controllership

August 16, 2:00 p.m. ET

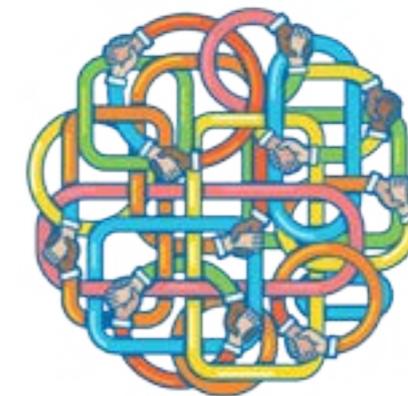
Presenter: Anthony Waelter

As the controllership function transitions to the digital era, the department is being asked to deliver more insights through data analysis and other qualitative information. How does the shift from debits and credits to bits and bytes impact controllership talent acquisition, retention, and management? We'll discuss:

- Attracting and retaining high-performing accounting professionals.
- Evolving your talent model to include professionals with the ability to adapt to the changing role of controllership and digital advancements.
- Creating an environment that fosters growth and development for the controllership function.

Learn from a panel of industry guests how other companies are working through these issues and building a controllership team for the future.

CLOs and CCOs
A new era of
collaboration



Financial Reporting

Host: Bob Uhl

FASB's targeted improvements to hedge accounting: Smoother sailing ahead?

September 7, 2:00 – 3:30 p.m. ET

Presenter: Rob Comerford

The anticipated FASB Accounting Standards Update on targeted improvements to hedge accounting aims to simplify certain aspects of that accounting model and more closely align entities' hedge accounting with their risk management activities. We'll discuss:

- Key provisions of the new guidance, including what has changed and what has remained the same.
- Areas of relief.
- Effective date and transition.

Learn about the new FASB guidance and key considerations and opportunities in the transition to the refreshed hedge accounting model.

Quarterly accounting roundup: An update on Q3 2017 important developments

September 19, 2:00 – 3:30 p.m. ET

Presenter: Rob Comerford

Do you know what issues the standard-setters and regulators have been addressing lately? We've been monitoring their projects and will discuss:

- Accounting, standard-setting, and reporting developments for the quarter.
- Recent positions on accounting and reporting of accounting and auditing standard-setters and regulators.
- Other hot topics.

Enhance your understanding of these and other important accounting issues and developments for the quarter.

Business Strategy & Tax

Host: Sam Lowenthal

Emerging technologies: Is your tax department keeping pace?

August 9, 2:00 p.m. ET

Presenters: Steve Ceglarek and Craig Darrah

Emerging technologies are altering the ways companies operate, disrupting standard business models, and creating complexities, demands, and potential opportunities for tax departments. What should financial executives know about how emerging technologies could be affecting their tax function? We'll discuss:

- An overview of the different types of emerging technologies in today's environment, including analytics, cloud computing, robotic process automation, and cognitive computing.
- Potential risks and considerations associated with implementing emerging technologies in your tax department.
- The future of emerging technologies and how they may impact tax, regulatory, and market dynamics.

Learn about the innovative ways emerging technologies are transforming business models and tax departments.



FASB's new
leases standard
Frequently asked
questions



Governance, Risk, & Compliance

Risk to reward: How principled behavior can enhance organizational culture and reputational resiliency

July 25, 2:00 p.m. ET

Host: Mike Juergens

Presenters: Mike Gelles, Carey Oven, Ralph Sorrentino, and Erica Volini

Corporate culture can hinder strategic objectives, but what about managing risk and creating competitive advantage? A focus on culture risk can inform risk appetite, risk mitigation, and the strategic reputation decisions and actions of an organization. We'll discuss:

- Business drivers that accelerate culture change and the role of key organizational stakeholders in transforming culture.
- Examples of culture transformation where surveys, cognitive technology, data analytics, and an ongoing culture risk action plan were applied to drive results.
- A framework for moving an organization's culture toward the principled behaviors.

Explore approaches to elevate corporate culture, mitigate risk, and use outcomes to drive organizational growth, increased market share, and reputational resiliency.

Third-party risk management: Driving value in the extended enterprise through transparency investments

August 22, 2:00 p.m. ET

Host: Mike Juergens

Presenters: Dan Kinsella, Adam Thomas, and Holly Tucker

Many organizations are investing in technology to support transparency in their extended enterprise risk management. What return on investment can be expected, and what lessons can others' efforts reveal? We'll discuss:

- Current issues impacting extended enterprise risk management, including a lack of confidence in existing tools and processes and challenges with data management.
- A new approach, including outcomes-based capability definition, a strong business case, a road map linking capabilities with tools, and alignment with other areas of risk management.
- Technologies for enabling risk management architecture, risk assessment, and controls testing, and end-to-end risk and control management.

Learn about a new approach to, and technologies for, managing risk in the extended enterprise.

Exponential change: Guiding transformation by challenging basic assumptions

August 30, 2:00 p.m. ET

Host: Deb DeHaas

Presenters: John Hagel and Tom Nassim

Even amid exponential change, organizations can find ways to refine and evolve the business through quick, concrete actions and identifying scalable growth opportunities that might fundamentally transform the business. How can board members and management work together in guiding such transformation while helping foster a positive culture of exploration and experimentation? We'll discuss:

- The importance of rethinking business fundamentals in a time of exponential change.
- Developing new zoom-in initiatives that further refine the long-term trajectory identified in zoom-out planning.
- The roles of management and the board in guiding transformation.

Learn how challenging the basic assumptions of an organization can build a healthy transformation and keep the business evolving as its surroundings change.

US government contracting hot topics: Navigating an evolving regulatory environment

September 12, 2:00 p.m. ET

Host: Mike Juergens

Presenters: Mark Burroughs (Brisbane) and Scott Silverstein

The US government contracting environment has new events happening on a regular basis that affect the marketplace. What should you know to maintain compliance and protect your company's reputation and its license to do business with the government? We'll discuss:

- Relevant federal court and board case decisions and implications for contractors.
- Regulatory updates, including what has changed, who is affected, and potential resulting compliance issues.
- DCAA, DCMA, DoJ, and DOD decisions and actions that might have significant implications for contractors, from increasing audit scope to providing determinations on practices and policies.

Explore relevant changes affecting US government contractors and actions you can take to remain compliant.



Driving Enterprise Value

Host: Miles Ewing

The CFO as a strategist-catalyst partner to the CEO

July 19, 3:00 p.m. ET

Presenter: Ajit Kambil

CEOs and boards increasingly want CFOs to deliver a finance organization that gets the numbers right and partner with them in shaping the company's strategy. But when asked what they want from a strategic CFO, their answers vary widely. How can the CFO best align? We'll discuss:

- The need for a strategy process that helps senior leaders take a common approach strategy formulation.
- The four orientations—responder, challenger, architect, or transformer—a CFO can undertake.
- Changing models of competitive advantage.
- Key questions CFOs can ask to generate strategic outcomes, and common requirements for effective CFO strategists.

Learn how to establish better alignment between CFOs' actions and CEO and board expectations.

Advanced forecasting in FP&A: Automation is here and expanding

August 31, 3:00 p.m. ET

Presenters: Mike Danitz and Adrian Tay

Leading-class financial planning and analysis (FP&A) organizations are advancing beyond simple bottoms-up forecasts that depend exclusively upon human effort and judgment. What are some of the more automated and mathematical approaches companies are using today to address the ongoing challenge of forecasting and planning? We'll discuss:

- Advanced algorithms most commonly used for statistical forecasting.
- Opportunities to automate the forecast to improve efficiency and reduce human bias.
- Methods of combining humans and machines to arrive at the most accurate and effective forecasts.

Learn how these changes are impacting talent models and some of the emerging technologies used to support these methods.

Thriving on uncertainty: The CFO's margin improvement playbook in a digital world

September 27, 3:00 p.m. ET

Presenters: Faisal Shaikh and Ranjit Singh

CFOs face unprecedented economic and political uncertainty, along with the breathtaking pace of digital disruption. How, in response, are finance organizations rethinking the way they operate to help their companies compete? We'll discuss:

- Effective practices companies are using today to manage costs and improve margins.
- The role of specific digital technologies in reshaping how businesses compete and drive efficiency.
- A new playbook approach to margin and business improvement that integrates four value levers.

Learn results of Deloitte's Global Cost Surveys, what a new integrated margin improvement playbook might look like for your organization, and the role CFOs can play in leading their companies to thrive in uncertain times.

CFO Insights
A biweekly
thought
leadership series



Technology, Media, & Telecommunications

Revenue recognition: Year-end considerations for technology companies

July 26, 1:00 p.m. ET

Host: Joe Talley

Presenters: Bryan Anderson, Brian Rose, and Amy Steele

The FASB's new revenue recognition standard likely means myriad changes to companies' financial reporting processes and systems, from accounting and internal controls to information technology, compensation, and more. What should technology companies be prepared for in the second half of 2017? We'll discuss:

- Key accounting issues and potential challenges for technology businesses.
- Potential SEC-related implications of the revenue pronouncement, from IPO considerations to enhanced disclosures.
- Implementation considerations and possible operational challenges within accounting, tax, and IT departments.
- Best practices for companies to coordinate with their auditors.

Gain new insights on these and other issues as technology companies continue preparations to operationalize the new revenue recognition standard.

The future of connectivity: Far-reaching implications for almost every business

September 26, 1:00 p.m. ET

Host: Craig Wigginton

Presenters: Dave Couture and Dan Littmann

The accelerating world of connectivity has important implications for almost every aspect of business, reshaping competitive landscapes and opening new market opportunities. What new demands could confront suppliers of connectivity, providers of related devices and services, and industries trying to gain competitive advantage? We'll discuss:

- Hot areas of connectivity, including evolving infrastructure, new operating models, and service innovations.
- The explosion in wireless options, including protocol archetypes, use cases, and a framework for selection.
- The path to value, including a framework for managing growth and costs, the SDN and NFV relationship, and partnership ecosystems.

Gain insights on the changing wireless landscape and learn about trade-offs and disruptions as the future of connectivity unfolds.

Manufacturing

Host: Randall Crowley

Time and attendance systems: A valuable source of unrealized potential?

August 17, 1:00 p.m. ET

Presenter: Jenine Bogrand

With employees tracking their time daily and management approving, time and attendance data can provide vital information about workforce efficiency, organizational patterns, and performance. How can your organization capitalize on it? We'll discuss:

- Determining potential ROI from your time solution, including value created through newfound transparency and visibility.
- Consolidation and deployment of a single type of time system versus diversification with multiple vendors.
- Pros and cons of deploying a global time solution versus multiple local solutions.
- Improving governance, aligning policies and processes, and increasing employee engagement by using your time solution as a pseudo communication tool.

Learn how time and attendance data can unlock opportunities for workforce performance and value creation.

Technology
Fast500

Online application
period open now
through June 30.



Travel, Hospitality, & Leisure

Host: Scott Rosenberger

Last mile, first movers: A new paradigm for transportation and shipping

August 24, 11:00 a.m. ET

Presenters: Ted Choe and Steve Gold

Technological and social trends are disrupting the transportation and shipping industry. How are incumbents rethinking their business models to avoid becoming commoditized? We'll discuss:

- Converging factors reshaping the movement of goods, including higher customer expectations, increasing digitization, new urban supply concepts, the growth of asset sharing, and alternative vehicles.
- How the last mile of logistics is particularly ripe for innovation due to the complexities of delivery and the growth of e-commerce.
- Possible future states defined by ownership of the delivery journey and level of visibility into that journey.

Learn how a new strategic framework can help transportation companies and their customers make decisions about resource allocation and technology investments.

Consumer Products

Host: Ryan Robinson

Cyber risks in consumer business: Be secure, vigilant, and resilient

July 19, 11:00 a.m. ET

Presenters: Kiran Mantha and Vikram Rao

Not surprisingly, consumer-facing businesses are increasingly vulnerable to cyber threats as utilization of customer-centric data strategies and emerging technologies become more commonplace. Is your organization appropriately addressing its cyber risk? We'll discuss:

- An overview of the impact evolving cyber risks represent across the consumer business space.
- Trends and risks in key areas, including executive and board-level engagement, human capital, intellectual property, connectivity, customer trust, and commerce.
- Leading strategies consumer businesses are employing to address cyber risks.

Learn ways to protect against the potential negative impact of a cyber breach and how to make your business more secure, vigilant, and resilient.



Energy & Resources

Host: Andrew Slaughter

The future of mobility: How will it impact the energy industry?

August 9, 2:00 p.m. ET

Presenters: Suzanna Sanborn and Thomas Shattuck

Emerging innovations and usage trends are reshaping vehicle fuel efficiency and personal mobility. What could these trends mean for energy and resources companies, and how can those companies adjust to the changing conditions?

We'll discuss:

- The factors driving change in the mobility landscape, including technology advancements, autonomous vehicles, and ride sharing.
- Impact of potential lower gasoline demand on the oil and gas sector.
- Impact of potential increased demand for electricity on the power and utilities sector.
- Opportunities and challenges energy companies may face as the landscape changes.

Learn how the future of mobility may impact energy companies and what they can do to prepare for it.

***Deloitte University Press related Dbriefs**

Oil & Gas

Digital capital projects: Optimizing the journey with emerging technologies

July 12, 2:00 p.m. ET

Host: Mike Whalen

Presenters: Paul Campbell and Gregory Mitchell

Often, owners undertaking major capital projects are burdened by inefficient and outdated processes and technology. What value could be added by leveraging emerging technologies in the planning, delivery, and operation of major capital projects? We'll discuss:

- How to build digital capabilities and harness technologies to drive capital project performance to new efficiency frontiers.
- How to identify the data foundation needed for digital capital projects.
- The organizational design needed to support a digital delivery platform and the cultural changes required.

Learn about several areas of business value that can be realized when a forward-looking digital strategy for major capital projects is adopted.

Oil and gas trends in Latin America: A look at 2017 and beyond

September 6, 2:00 p.m. ET

Host: Andrew Slaughter

Presenter: Thomas Shattuck

Despite record-high oil prices over the last decade and the dramatic rise of US shale, Latin American oil and gas production has not grown as rapidly as expected. With major political reforms in key countries and renewed investment from both independent and national oil companies, is investment or production at an inflection point? We'll discuss:

- Current business and political challenges facing exploration and production (E&P) companies in Argentina, Brazil, Mexico, and Venezuela.
- The challenges, risks, and opportunities of current sectoral reforms underway.
- How E&P companies can adapt and thrive in a changing business environment.

Learn how current trends and events in Latin America are shaping the future of E&P activity.



Life Sciences & Health Care

Host: Terry Hisey

The journey to value-based care: Strategies for driving health care value

July 11, 1:00 p.m. ET

Presenters: Ken Abrams, Mark Bethke, and Wendy Gerhardt

With health care organizations now well along their journey to value-based care, new regulations like MACRA are bringing that goal into the forefront faster. How are alternative payment models faring in terms of delivering quality care and reducing costs, and how does this shift play into new ways of thinking about care models? We'll discuss:

- Trends in value-based care and opportunities through bundled payment models and post-acute care.
- Potential approaches to bundled payments, associated challenges, and keys to success.
- Implications of new payment models and strategies for health care organizations to drive value.

Learn results from Deloitte Center for Health Solutions' research on strategies for bundled payments and post-acute care.

***Deloitte University Press related Dbriefs**

Digital disruption and health care: The exponentials era is here

August 8, 1:00 p.m. ET

Presenters: John Kutz, Rick Swanson, and Jason Wainstein

Facing continued rising costs and inconsistent outcomes, the health care industry is ripe for innovation. What emerging technologies could help stakeholders make exponential leaps toward improved care and health outcomes while reducing costs? We'll discuss:

- 12 exponential technologies and associated paradigm shifts that are transforming health care, including synthetic biology, digital medicine, additive manufacturing, data democratization, cognitive and ambient computing, and telemedicine.
- How combinations of these technologies could create disruptive threats that fuel competitive health care business models.
- Practical steps stakeholders can take to deploy these technologies.

Learn how exponential technologies could finally break the constraints of fee-for-service-based health care and help deliver care in ways previously not thought possible.

Driving innovation in life sciences: What is next for developing breakthrough therapies?

September 19, 1:00 p.m. ET

Presenters: Mary Cummins, Brett Davis, and Asif Dhar

New innovations could dramatically change health care, especially relating to chronic and life-threatening conditions. How can biopharma and medtech companies leverage such innovations to advance breakthrough therapies and provide better patient-centered care? We'll discuss:

- Technologies and analytics that improve care quality in therapeutic areas such as oncology, diabetes, and cardiovascular by enabling patient access to cutting-edge treatments and clinical trials while reducing disparities in care.
- New operating models based on end-to-end evidence management and real-world evidence (RWE) that help deliver value and drive innovation.
- The importance of cross-industry collaboration in bringing new products and therapies to market.

Learn about Deloitte's RWE Benchmark Survey and how organizations can effectively move toward patient-centered care.

Navigating
bundled
payments
Key strategies
to reduce costs
and improve
health care



Federal & State Government

Host: Bill Eggers

AI in government: Could smart technology revolutionize the public sector?

July 25, 2:00 p.m. ET

Presenters: Marc Mancher

Using artificial intelligence (AI)-based applications, researchers are showing governments how to save billions of dollars through task automation. But what tough decisions will be required to implement these technologies? We'll discuss:

- An overview of how AI is being used across government and the level of savings being generated.
- Types of AI in use now and in the future, including natural language processing, robotics, machine translation, computer vision, and machine learning.
- Four choices government agencies face regarding which functions to automate—relieve, split up, replace, or augment?

Learn how AI can improve speed, quality, and cost in government operations and the importance of developing a business case for each technology.

***Deloitte University Press related Dbriefs**

Creating the Agile mindset in government

September 7, 2:00 p.m. ET

Presenter: John O'Leary

Agile approaches to software development can drive value with accelerated speed-to-market, enhanced quality, and reduced waste. However, the enterprisewide adoption of these methodologies requires a new way of thinking, from procurement and governance through process and staff adoption. What are effective strategies on creating an Agile mindset throughout government organizations? We'll discuss:

- Closing the culture gap between technology and business.
- Evolving role of the acquisition officer.
- Developing policies and governance.
- Training for last-mile adoption of Agile projects.

Explore ways government can prepare to enable Agile methodologies and help drive success throughout the Agile project life cycle.

***Deloitte University Press related Dbriefs**

Real Estate & Construction

Host: Bob O'Brien

Building for the future: Elevating the role of internal audit in REITS

August 3, 2:00 p.m. ET

Presenters: Matt Kimmel, Adam Regelbrugge, and Brian Ruben

Uncertainty in today's real estate markets demand thoughtful and diligent risk management in REITs. How can the internal audit function play a more prominent and effective role in that process? We'll discuss:

- How an integrated enterprise risk management program can help address risk, identify opportunities, and build board and audit committee confidence in management.
- Using analytics to assess pools of data, proactively identify risk management indicators and trends, and reveal areas of operational improvement.
- How internal audit can advise on emerging risk areas, such as cyber risk and third-party risk.

Learn how internal audit can help REITs address vital areas of risk while protecting against threats to operations and brand.

Robotics and cognitive automation: A new age of competitiveness in real estate

September 14, 2:00 p.m. ET

Presenter: Sridhar Rajan

Businesses across industries are increasingly turning to emerging technologies that can automate manual tasks and human judgment. Is there a place in real estate management and operations for these astounding innovations? We'll discuss:

- Innovations in the marketplace, such as robotic process automation, cognitive technology, and machine learning, and their capabilities.
- The practical application of these technologies in different industries, especially financial services firms that are leading the adoption curve.
- Potential applicability for real estate firms and the benefits and challenges of such automations.

Explore how real estate firms can use automation to augment humans for increased operational efficiency, cost reduction, and competitive advantage.



Financial Services

Robotics and AI in financial services: Capturing value while addressing risks

July 18, 2:00 p.m. ET

Host: Monica O'Reilly

Presenter: Dilip Krishna

With the emergence of advanced technologies and data science, financial services organizations are increasingly turning to robotic process automation and artificial intelligence (AI) to gain efficiencies and reduce costs. But, as more processes are turned over to robots, what new risks can companies become exposed to and how can such risks be addressed? We'll discuss:

- Various kinds of risks to which companies are exposed via robotics and AI.
- Implementation and governance techniques to limit the risks of robotics and AI.
- Techniques for mitigating risks of robots in production.

Learn practical examples of how to prepare your organization to address the risks associated with advanced automation technologies.

Operational risk: A new governance tool for business strategy and decision making?

August 2, 2:00 p.m. ET

Host: Krissy Davis

Presenters: Steve Bhatti and Chris Thackray

Operational risk events often originate outside of existing risk management frameworks. Why, with significant investments in operational risk management, do these control failures occur, and in light of recent fines and losses, what are expectations of operational risk among C-suite executives and boards of directors? We'll discuss:

- The impacts of changes in the standardized measurement approach (SMA) for operational risk capital exposure.
- How organizations are rethinking operational risk in terms of business strategy and decision making.
- How advancements in technology both require and enable improved operational risk capabilities.

Learn how operational risk is becoming a C-suite and board-level tool to manage and inform strategic and day-to-day business decisions.

Blockchain: Measuring its evolution and development via open-source collaboration

September 13, 2:00 p.m. ET

Host: Val Srinivas

Presenters: Daniel Byler and Eric Piscini

Blockchain began as open-source technology. What role does open source have on blockchain's evolution in business application? We'll discuss:

- How data science can distinguish commercial blockchain development on GitHub, the world's largest open-source software development platform.
- Open-source projects—how many times they are copied, how many contributors, and why they die.
- Predominant development languages, accompanying software, and participation of FinTech companies in projects.
- Types of financial services blockchain applications being developed and the communities of firms and developers behind these applications.

Learn how data science is being used to mine, scrub, and organize open-source collaboration to determine the direction of the next most transformative technology in the world.



Insurance

Host: Gary Shaw

2017 insurance M&A mid-year market update

August 10, 2:00 p.m. ET

Presenters: Bruce Fell, Matt Hutton, and Boris Lukan

Given the active deal flow that occurred during the second half of 2016, M&A has been a major topic of discussion in the insurance industry in 2017. Is that momentum sustainable through the remainder of this year and into next?

We'll discuss:

- An analysis of the issues that impacted insurance M&A during the first half of 2017.
- Where deals are likely to occur during the remainder of 2017.
- Whether foreign buyers will continue to be active bidders for US-based insurers.
- Whether the consolidation of the brokerage sector still has room to run.

Gain a fresh perspective on issues reshaping the insurance landscape in 2017 and beyond.

The cyber regulatory environment: Evolving risk, adaptive response

September 5, 2:00 p.m. ET

Presenters: John Clark, Guarav Kumar, and Howard Mills

Cyber risk remains a top concern for insurers and regulators as threats continue to evolve. What cybersecurity standards do regulators expect the industry to meet?

We'll discuss:

- State regulator expectations – will there be common themes or will insurers have to cope with a patchwork quilt of regulatory standards?
- Whether federal regulators will have a different perspective than the states.
- Governance – how important is board or C-suite oversight to regulators?
- FinTech – is the answer for insurers to fight fire with fire?

Hear more about the developing landscape for cyber regulation and the strategies and tools available to insurers to keep pace.

Investment Management

The new FASB revenue recognition standard: Charting an effective implementation

July 11, 2:00 p.m. ET

Host: Trevor Farber

Presenter: Crystal Andersen, Rajan Chari, and Rob Moynihan

Is your asset management firm implementing the FASB's new revenue recognition standard? The FASB's Accounting Standards Update No. 2014-09, Revenue from Contracts with Customers, takes effect in 2018 for public asset managers with annual reporting periods beginning after December 15, 2017. We'll discuss:

- Lessons learned from companies in the midst of implementation.
- The top three challenges asset managers could face during adoption, including performance fees, distribution fees, and gross versus net presentation.
- Important considerations for asset managers and suggested steps for timely and effective preparations.

Gain new insights on developing and executing an effective revenue recognition implementation plan.

Leadership in crisis: Empower your organization

August 1, 2:00 p.m. ET

Host: Peter Poulin

Presenters: Carolyn Dumser and Rhoda Woo

Corporate crises continue to generate headlines and impact financial statements. How can effective crisis management techniques for the digital era help investment managers be more resilient when facing a novel event? We'll discuss:

- Practical scenarios, such as a cyberattack, a rogue trader, or third-party provider breakdown, and potential implications for investment managers.
- How various crisis management methodologies can be used to defend against and mitigate such crises before they upend your strategic decision making, long-term viability, and brand value.
- Capabilities of a mature crisis management organization and the required attributes to reach an optimized crisis organization.

Learn how professional crisis responders prevail against financial- and reputation-damaging events.



Private Companies

Preparing for an IPO: Build a solid plan and avoid surprises

July 27, 2:00 p.m. ET

Host: Wolfe Tone

Presenters: Heather Gates, Ryan Tolley, and Previn Waas

An initial public offering is one of the most choreographed events in the life cycle of a private company, and without advance planning it can be extremely challenging to achieve your planned timeline. How will you prepare your company for this major milestone? We'll discuss:

- A typical IPO readiness time frame, road map, and ways to prepare for each step of the journey.
- The top challenges companies face in executing their IPO project plan.
- Leading practices for managing the SEC comment letter process.

Gain additional insights that can help you make critical business decisions to prepare for life as a public company.

Private company
issues and
opportunities

What to
consider in
2017



Older, more diverse, better educated: Meet the future US labor force

August 29, 2:00 p.m. ET

Host: Bob Rosone

Presenters: Daniel Bachman and Patricia Buckley

Much attention is paid to millennials and the new Gen Z as influencers of workforce trends. Yet emerging data suggests that older workers aren't going anywhere. What could this mean for private companies? We'll discuss:

- Demographic trends impacting the workforce mix, including slower overall labor force growth, increasing diversity, and gains in labor force share by seniors and women.
- Education trends, including continued growth in degreed workers and the types of degrees being pursued.
- Changes in occupational mix, including increasing concentrations in health care, technical, food service, and personal service jobs.

Learn why private companies should continue to engage younger workers while not forgetting the changing needs and importance of older workers.

***Deloitte University Press related Dbriefs**

Mid-market technology trends: Leveraging disruption to drive value

September 28, 2:00 p.m. ET

Host: Bob Rosone

Presenters: Chris Jackson and Stephen Keathley

With a raft of new technologies set to disrupt business as usual across every sector of the economy, are private companies doing enough to get ahead of them? We'll discuss:

- How companies are leveraging emerging technologies and other more mainstream technologies to create value.
- Opportunities to support growth and increased efficiency to drive bottom-line impact, including robotic process automation, machine intelligence, mixed reality, cloud integration, and everything as a service.
- How digital disruption continues to shape and evolve leadership roles and organizational culture.

Learn results of Deloitte's 2017 mid-market technology survey and the IT priorities, plans, and expectations of more than 500 senior executives from private and mid-market companies.

For program information, visit www.deloitte.com/us/dbriefs



China Issues

Host: Vivien Wang

China's tax reform: Understanding the changes, planning for the future

July 13, 11:00 a.m. ET

Presenter: Hong Ye

As China's leadership continues to advance new policies aimed at stimulating the economy, tax reform is an important ongoing initiative. Significant developments include last year's VAT overhaul and the recent rollout of tax cuts for businesses and individuals. What are the broader implications and trends in the context of global investment? We'll discuss:

- Current state of tax reform and future outlook.
- Latest developments in China's VAT system.
- Tax-saving opportunities and incentives for multinational companies.

Learn more about tax reforms in China and the global impact of these changes on the competitive business landscape.



Technology Executives

Host: Bill Briggs

Growing up digital: What digitally maturing companies do differently

July 13, 2:00 p.m. ET

Presenters: Doug Palmer and Jerry Kane, Professor of Information Systems, Carroll School of Management, Boston College

Increasingly, companies realize that becoming a digital business requires a maturation process with very different levels of leadership vision and commitment. What sets digitally maturing companies apart from their early-stage counterparts? We'll discuss:

- How and where companies approaching digital maturity are investing to strengthen their digital strategies.
- The difference cultivating a culture that embraces risk, collaboration, and change makes in becoming a mature digital business.
- Why making learning a key competency could boost employee retention.

Hear findings from Deloitte's sixth annual study of digital business in collaboration with *MIT Sloan Management Review* and learn what they could mean as your enterprise and IT organization mature digitally.

Cloud adoption: Navigating a still-challenging path

August 3, 2:00 p.m. ET

Presenters: Ranjit Bawa and Ken Corless

Cloud adoption is accelerating across industries as organizations leverage it as a catalyst for a broader shift in operating models, especially in how IT transforms and enables the business. Yet despite the excitement and promise of cloud, there are still challenges. We'll discuss:

- The evolving cloud landscape and key business and IT benefits driving cloud adoption.
- Significant challenges in enterprise cloud adoption.
- Constraints impacting key decisions, including cloud economics, barriers to entry, vendor lock-in, security and regulation, legal and contracting pitfalls, and talent shortages.

Explore ways to navigate remaining cloud-adoption considerations, accelerate your organization's ability to leverage cloud, and deliver the promise of new IT.

The future of mobility: How is technology fueling the revolution?

September 14, 2:00 p.m. ET

Presenter: Brett Bonthron

The way people and goods travel from point A to point B is changing, creating a series of new and evolving ecosystems that enable personal mobility. This shift is made possible through revolutionary technologies reaching far beyond autonomous vehicles. We'll discuss:

- New ecosystems the future of mobility will drive and how they will operate.
- Where value will be created and captured through new strategies, business models, product portfolios, and capabilities.
- Key technologies enabling seamless connectivity, including an integrated reference architecture for cities and regions, autonomous drive, and Mobility-as-a-Service.

Learn about exciting developments in personal mobility, the new ecosystems emerging around it, and how they will impact the broader technology agenda.

***Deloitte University Press related Dbriefs**

Tech Trends 2017

The kinetic
enterprise. The
only constant
is change.



Careers and learning in the digital age

August 24, 2:00 p.m. ET

Presenters: Dani Johnson, Bill Pelster, and Jennifer Stempel

The half-life of employee skills is falling rapidly, placing huge demands on learning and development (L&D). To adapt, companies are beginning to deploy continuous L&D. We'll discuss:

- What employees expect from longer life spans and how that drives the need for rapid skill development and the commoditization of content.
- New digital-age L&D tools and approaches, including curated content, video and mobile learning, and new L&D missions, structures, and operations.
- Lessons learned and practical steps to take, including rethinking the company's job architecture, L&D technology infrastructure, and the corporate university.

Learn results of Deloitte's fifth Global Human Capital Trends survey and how to encourage employees to constantly learn and relearn throughout their careers.

***Deloitte University Press related Dbriefs**

Leadership disrupted: Pushing the boundaries

September 6, 2:00 p.m. ET

Presenters: Neil Alger and Noah Rabinowitz

High-performing leaders today need different capabilities, yet most organizations are behind in developing digital leaders, promoting young leaders, and building new leadership models. What will change the paradigm? We'll discuss:

- Factors driving the need not only for stronger leaders, but a completely different kind of leader.
- Why the entrenched leadership industry struggles to solve the challenges of developing digital leaders.
- Characteristics of digital leaders who can guide organizations in the shift from doing digital things to being digital enterprises.
- Lessons learned and practical steps, including rethinking the leadership model and identifying digital leaders internally.

Learn results of Deloitte's fifth Global Human Capital Trends survey and how to develop digital-focused, team-centric leaders.

***Deloitte University Press related Dbriefs**

2017 Global Human Capital Trends

Rewriting the rules in the digital age



US tax reform: What is in store for businesses and individual taxpayers?

July 18, 2 p.m. ET

August 30, 2 p.m. ET

September 13, 2 p.m. ET

Presenters: Terri LaRae and Jonathan Traub

Congressional efforts to enact tax reform include potential changes to the tax code that are quite broad. How can you learn about key tax legislative and regulatory developments that could significantly impact your company's business models?

We'll discuss:

- The current tax policy environment and possible future developments.
- Likely corporate and individual tax rate changes.
- Implications and outlook for base-broadening provisions, such as the proposed border adjustment tax, international repatriation, full expensing, and non-deductibility of interest, among other topics.

Stay ahead of what would be the first meaningful tax reform in three decades while learning about emerging requirements that could impact your business and practical steps you can take in response.



Global Mobility, Talent, & Rewards

Host: Elizabeth Drigotas

Rise of the employment tax function: Changing expectations and how companies are responding

July 6, 2:00 p.m. ET

Presenters: Eira Jones, Matthew Pover, and Martin Rule

Increasingly, tax authorities worldwide expect faster, more accurate, and transparent employment tax and payroll compliance. How are leading multinationals responding? We'll discuss:

- Trends in compliance enforcement, including changing views among tax authorities about what compliance means and the impact of a global trend toward payroll digitalization.
- How more companies are moving toward a centralized employment tax function and assigning them executive ownership and accountability, including financial, reputational, and risk management.
- Insight into how companies are closing the gap between tax authority expectations and their ability to comply operationally, while maintaining focus on employee experience.

Learn about emerging trends in global employment tax compliance and practical steps for addressing them.

Talent mobility innovations in the tech industry: What should other companies know?

August 2, 2:00 p.m. ET

Presenters: James O'Neill and Nicole Patterson

Technology companies are increasingly viewed as innovators in talent mobility cost effectiveness, service delivery models, and employee experience. Do these innovative approaches work effectively in other industries? We'll discuss:

- Drivers behind innovations in the ways technology companies are using talent mobility.
- Specific strategies technology companies are using, including use of permanent local transfers versus home-based, tax-equalized assignments, greater emphasis on employee experience across all levels, and enhanced vendor management of outsourced providers.
- Considerations for whether and how to leverage these innovations and integrate them into your own company.

Explore effective practices in talent mobility from the technology industry and lessons learned from non-tech companies that are adopting such innovations.

Tax Accounting & Provisions

Host: Vickie Carr

Year-end updates, recent developments, and a look back at 2017 hot topics

September 27, 2:00 p.m. ET

Presenters: Rick Favor and Tim Samonds

It's important to stay ahead of tax reporting changes and associated issues your organization should be considering. What financial reporting matters may be important for you as you approach year end? We'll discuss:

- Year-end updates.
- A look back at hot topics throughout 2017.
- Standard-setting developments.
- Regulatory developments.

Gain valuable insights on the latest developments and their impact on financial reporting for taxes.



Inclusive mobility
Discover how mobilizing a diverse workforce can drive business performance

Federal Tax

Host: Bob Kilinskis

Rate reduction or not: Boosting the benefits of federal tax planning

August 8, 2:00 p.m. ET

Presenters: Wendy Friese and Jane Rohrs

With the possibility of a federal tax rate reduction, companies may want to consider additional tax accounting method planning for tax year 2017. How might such planning boost rate reduction tax benefits and, absent a rate reduction, still produce time-value of money benefits? We'll discuss:

- An overview of relevant tax reform proposals.
- Opportunities to accelerate deductions in 2017 and defer revenue into 2018 and potential permanent benefits.
- Potential Forms 3115 for changes in tax accounting methods that may need to be filed.

Explore an array of opportunities to accelerate deductions and defer revenue to gain a time-value of money benefit, possibly boosted by a permanent benefit with a rate reduction.



Tax Operations

ERP systems and operational transfer pricing: Relief is on the way

July 20, 2:00 p.m. ET

Host: Nathan Andrews

Presenters: Stephen Losavio and Bob Norton

As multinational companies face increasing transfer pricing challenges, ERP vendors have taken note. What are recent developments from two leading ERP vendors? We'll discuss:

- An overview of operational transfer pricing challenges in a post-BEPS world where the need for integrated systems and data is growing.
- How Oracle and SAP are adapting existing tools in their portfolio to the transfer pricing space while also developing new tools to address related challenges.
- How tax executives may be able to leverage their company's existing investments in technology by extending certain functionality to meet operational transfer pricing demands.

Learn how ERP vendors are helping multinationals address the challenges of their global transfer pricing operations.

Tax compliance and provision software: Annual tax technology update

August 17, 2:00 p.m. ET

Host: Joel Hermes

Presenters: Greg Bartolone, Lisa Covelli, and Allison Matthews

In recent years, tax software companies have expanded their offerings to include much more than just income tax provision and compliance solutions. What enhancements should you be aware of, and are you taking full advantage of the software you already license? We'll discuss:

- A recap of the leading income tax compliance and provision software packages in the marketplace today.
- The latest direct income tax software trends in the marketplace today, including country-by-country reporting, dashboarding, analytics, robotics, and workflow.
- Emerging technologies to keep an eye on over the next couple of years.

Gain timely insights on developments in income tax and compliance technology.



Multistate Tax

Host: Scott Frishman

Indirect tax and the Internet of Things: Where could convergence impact your organization?

August 1, 2:00 p.m. ET

Presenters: Kiersten Gulotta and Rick Heller

The Internet of Things (IoT) has captured the limelight in recent years. But what does it really mean and how does it impact tax professionals? We'll discuss:

- How the IoT became so prominent in today's technology lexicon and where it is headed.
- From telematics, the connected home, and smart cities to the connected cow, how organizations across the industry spectrum are using the IoT.
- How proper sourcing and classification is important for vendors and purchasers analyzing potential indirect tax obligations and accruals associated with IoT products and services.
- Practical implications of managing states' expanding nexus guidance, such as click-through, affiliate, and economic nexus provisions.

Learn about this emerging area of indirect taxation.

Tax Controversy

Host: John Keenan

A primer on IRS advice and guidance processes

September 12, 2:00 p.m. ET

Presenters: Howard Berman, Diana Hoshall, and Anne Oliver

For anyone not familiar with the inner workings of tax administration, the processes for requesting advice and interpreting guidance from the IRS may seem puzzling.

What types of advice and other guidance does the IRS provide and what are the processes for requesting advice from the IRS? We'll discuss:

- The procedures for taxpayers to request advice from the IRS National Office, including Private Letter Rulings and determination letters.
- The steps for requesting a Pre-filing Agreement.
- The Technical Advice Memorandum process.
- Other publicly available IRS guidance.

Learn about various types of IRS advice and guidance that every taxpayer and tax practitioner will want to be familiar with.



International Tax

Host: Tony Kunkel

Shifting sands: What tax changes may impact inbound investors to the United States?

August 31, 2:00 p.m. ET

Presenters: Gretchen Sierra and Michael Steinsaltz

The tax landscape for foreign-headquartered companies investing in the United States could soon face some significant changes. What tax-related developments in the United States and European Union may be most important for your company and how can you navigate them? We'll discuss:

- Tax-related developments in the United States and European Union that could change the inbound investment landscape.
- In light of those developments, considerations for financing or refinancing your US operations.
- Developing and managing intangibles assets and designing and implementing supply chain strategies.
- Issues and opportunities related to M&A and post-merger integration.

Hear about recent developments in tax laws and regulations that might impact your plans to invest in US operations.

Transfer Pricing

Host: Mark Nehoray

BEPS contract review: Why it matters

July 12, 2:00 p.m. ET

Presenters: Alan Shapiro and Joe Tobin

The OECD's BEPS Actions 8-10, covering Transfer Pricing Guidelines, recommend granular functional and risk analysis to determine whether a controlled transaction has economic substance. Why is a review of intercompany transaction contracts the starting point? We'll discuss:

- Broad categories of risk and the six-step process for accurately delineating each transaction's economically significant risks.
- How contracts can provide evidence of who is managing and controlling significant risks, and the three elements of risk management.
- How contracts can provide evidence of appropriate control over day-to-day risk mitigation, especially when mitigation activities are outsourced.
- Testing the contractual allocation of risk.

Learn more about this vital and highly complex area of transfer pricing tax compliance.



Our Presenters

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